RV BUSINESS

FEBRUARY 18, 1991

SPECIAL ISSUE:
1991 RV & VAN INDUSTRY DIRECTORY

- RV Industry Almanac With An Overview Of Shipments And a 1991 RV Show Calendar
- Alphabetical Listings of RV Makers, Van Converters, Suppliers, Distributors, Manufacturers' Reps and Service Firms
- Product Lists For Suppliers
- RV & Van Conversion Product Lists, Brand Names

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COVER GRAPHICS: ROY MONTIBON

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TRACKING RV SHIPMENT TRENDS

MORTON J. MARCUS

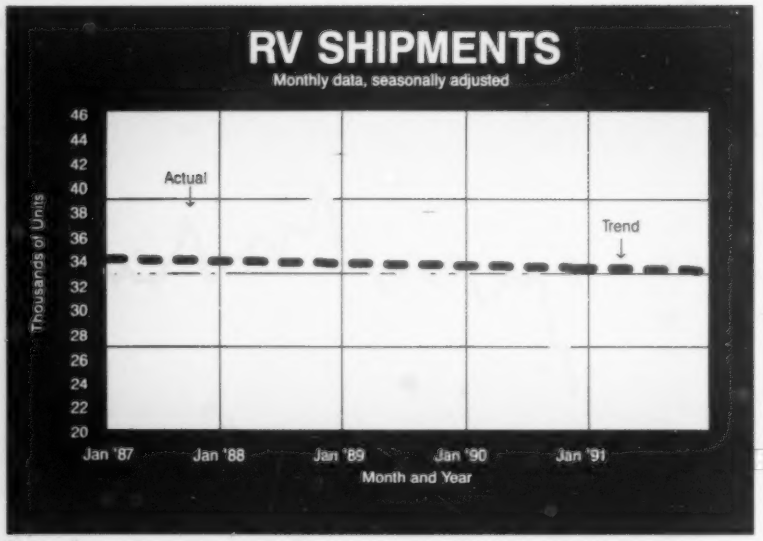


Figure 1

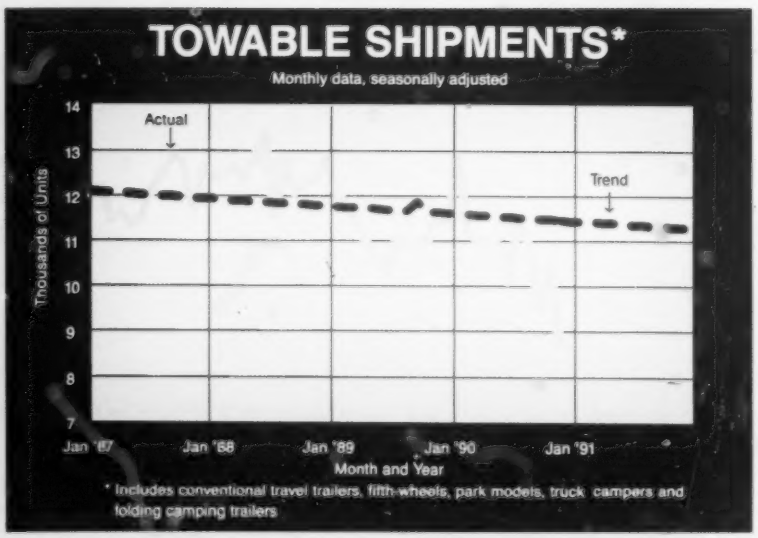


Figure 2

This section presents an overview of RV shipments, month-by-month, from January 1987 through November 1990. The data shown are all adjusted for normal seasonal fluctuations. Also shown in figures 1 through 12 are trend lines for each type of RV. These trends are simple straight lines fitted to the data through 43 months to July 1990 and then extended to the end of 1991. Excluded from the trend, but shown as actual data, are the months since the occupation of Kuwait by Iraq, which resulted in a variety of economic disruptions. However, as will become clear, not all types of RV units were similarly affected by the dramatic events and uncertainties of late 1990.

Total RV Shipments

After a rising trend in 1987 and 1988, total RV shipments growth became flat to down. The last three months for which data were available at presstime – September, October and November 1990 – clearly showed the effect of the Middle East strife. The fluctuations in shipments during 1989 were minimal, and a narrow range of movement was also evident in early 1990 to mid-1990.

The trend line for total RV shipments shown in *Figure 1* has become, strangely, a goal for 1991. For every month since December 1989, shipments have been below that declining trend line. To regain that line alone would be an accomplishment. To shift the shipments trend to an upward direction would be a triumph.

Towables

Shipments of towables during the period shown in *Figure 2* peaked at 13,400 units in June of 1988. Since February 1989, towables have exceeded the 43-month trend only once. The downward movement of late 1990 appeared as a continuation of tendencies already in place. Recovery to the trend line from the depressed state of November 1990 would involve an increase of 2,700 units per month – a 31% advance.

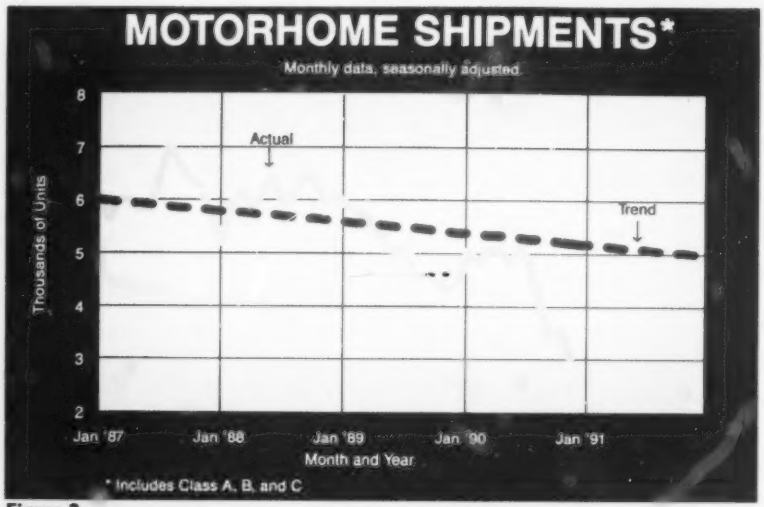


Figure 3

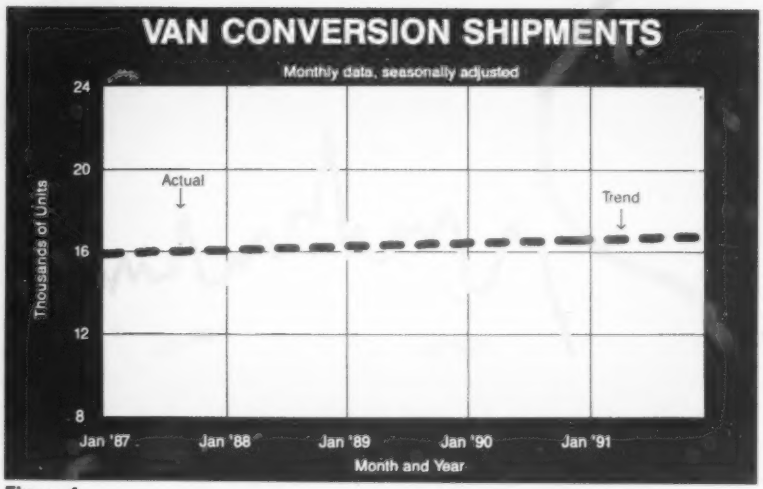


Figure 4

The Difference Between Trends and Forecasts

Trends, as used here, are simple statistical relationships between time and shipments. They are the result of laying a mathematical ruler over the data and drawing a straight line to fit the dots to minimize the divergence of each year's shipments from that trend line. Trends do not tell us why or how something happens. They reflect the past without reference to anything going on in the world. They are useful in giving a general direction. They help us see where we are going – if the road remains as it has been. The projections produced by these trends are the result of extending the line drawn with this statistical ruler. On the other hand, forecasts, as published quarterly in RV Business, *involve a combination of statistical analysis and professional judgment. They are based on the response of shipments to various factors in the economy (interest rates, for example) and require development of a complex econometric model that will indicate how shipments respond to these factors and how these factors are likely to perform in the future. Forecasts help us see where we are going – if we respond to the future as we responded to the past and if we are accurate in our anticipation of that future.*

Motorhomes

The peak for motorhomes was reached very early in the period depicted in *Figure 3*. In August 1987, total motorhome shipments reached 7,050 units (seasonally adjusted). From that point, they declined through 1987, stabilized in 1988 and then dropped in a fairly steady fashion in 1989. The record for 1990 was a tight, flat pattern until the Iraqi invasion of Kuwait drove petroleum prices upward and put considerable uncertainty into the minds of consumers. Recovery to trend from the low of November 1990 would be a 70% jump in volume.

Van Conversions

Contrary to the declining trends of towables and motorhomes, van conversions have shown a modest upward tendency in recent years. *(See Figure 4.)* Even if one disregards the dramatic spike of November 1988, a steady progression is evident. After a brief decline at the start of 1990, recovery to trend was evident by midyear. However, the economic trauma of 1990 struck van conversions as it had other types of RV. As of November, these shipments were down by nearly one-third from their trend line.

Conventional Travel Trailers

From a peak of 5,440 units shipped in February 1987, there has been an unsteady but unmistakable downward trend in the shipments of conventional travel trailers. *(See Figure 5.)* The valleys have deepened in successive declining movements, although the peaks have shown a less steady progression down. Were it not for the sudden strength of July 1990, the last three monthly observations recorded during the Persian Gulf crisis in 1990 could be seen as an extension of a yearlong slippage.

Park Models

Park models have had considerable variability around an unexciting upward trend during the past four years. Even the early stages of the Persian Gulf crisis did not alter the performance of shipments in this group. The single decline (in October) after the Iraqi incursion was not particularly dramatic. The decline of June was a far more significant drop. Contrary to other types of RV shipments, an increase of just 11% is needed for park models to regain the trend line of *Figure 6*.

Fifth-wheels

Before the Middle East problems, fifth-wheels had a dramatic fall-off from a generally improving trend shown in *Figure 7*. The

sharp decline of June 1990 was nearly 15%. This exceeded any effect on these units by the concerns over oil prices or recession, which began two months later. The June 1990 drop was all but identical to the transitory July 1988 decrease, but no comparable recovery was evident from data available at presstime. In November 1990, shipments of fifth-wheels were still off the trend by the amount of their fall in June. Hence, their depressed state cannot be attributed to Mideast events, although those events may have impeded a recovery.

Folding Camping Trailers

The Middle East crisis of late 1990 did not seem to be a factor influencing folding camping trailers. The trend of 1987-1990 in *Figure 8* was downward—with brief, dramatic reprieves. More precisely, the downward movement began in mid-1988 and included six successive months of decreased volume in late 1988 and early 1989. Yet during the Persian Gulf crisis in 1990, October shipments managed to hit the trend line, although that improvement was sandwiched between two months of far less activity.

Truck Campers

The trend line for truck campers in *Figure 9* is almost flat. Middle East events seemed to have no impact until November of 1990. Shipments in 1989 and 1990 moved in a narrow, low-volume range until the drop of 300 units in November 1990. Due to that November drop, it would require a 38% shipments increase to regain the trend line of 1987-1990.

Class A Motorhomes

Shipments of Class A motorhomes in *Figure 10* look as though a reversal of a downward drift was nipped in the bud during late 1990. From a level of 3,840 units in September 1988, there was an unsteady progression of declines to 2,550 units in August 1989. An upward drift then began until interrupted by political and military events in the Persian Gulf. By November of 1990, shipments were nearly 43% below the 43-month trend.

Class B Motorhomes

It is quite possible to see an upward trend in the data of *Figure 11*. From a low of 290 units in November 1987, a gradual upward trend in shipments of Class B motorhomes can be perceived. This is contrary to the downward trend shown, which is based on a longer period including the strong late-summer shipments of 1987. The

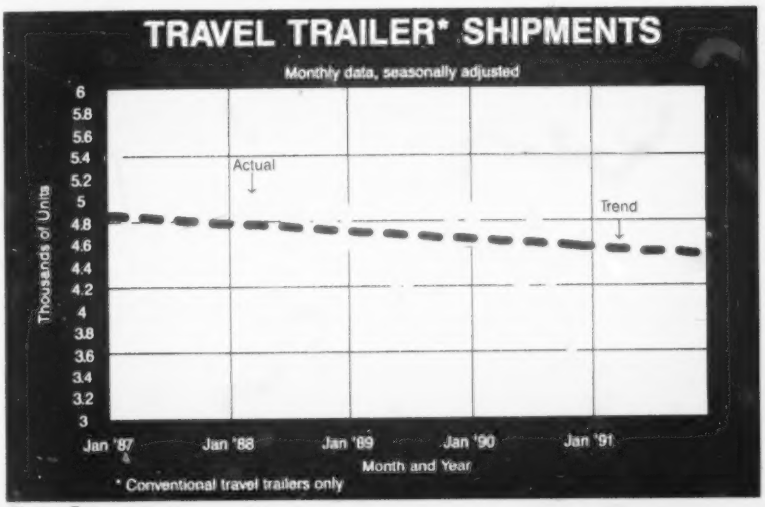


Figure 5

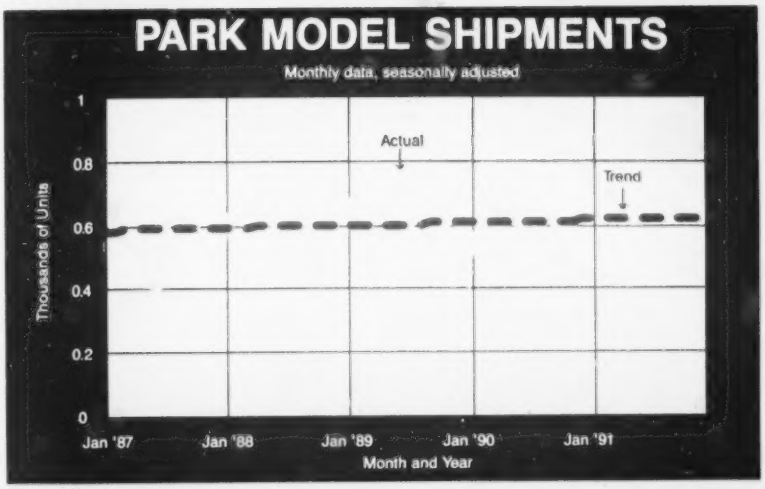
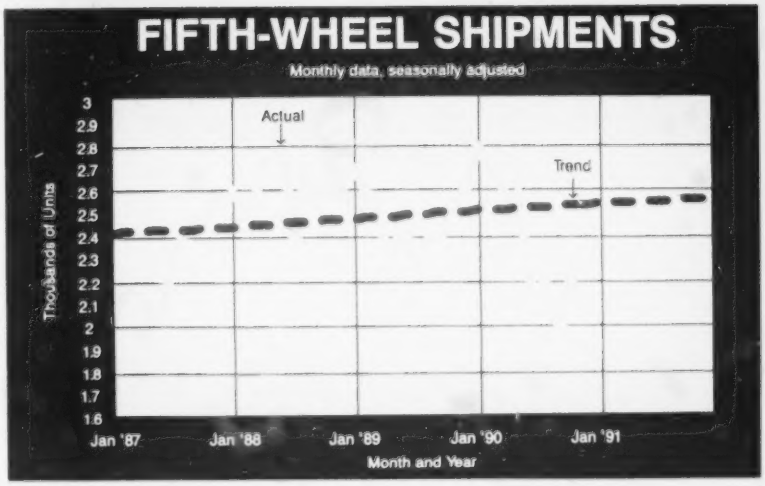


Figure 6



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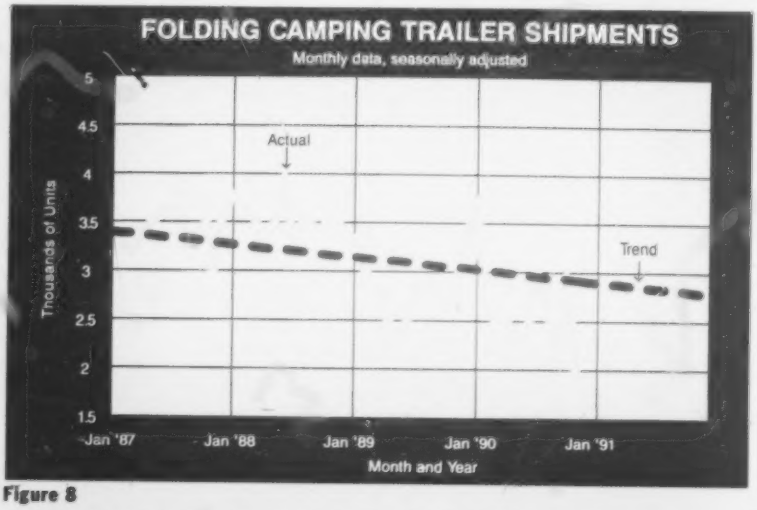

Figure 8

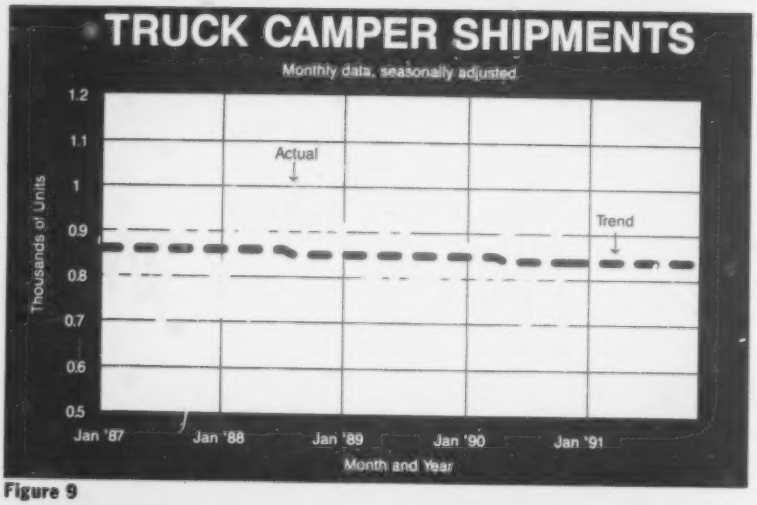

Figure 9

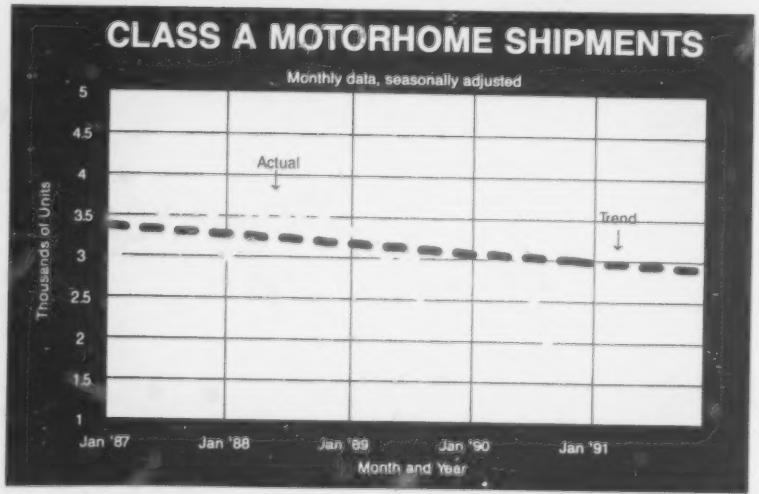

Figure 10

Kuwait situation then seems to have pushed Class B motorhomes back down to the trend line for the 43-month period. A resumption of more normal conditions could bring a restoration of the 500 monthly units lost in reaction to the tumultuous times.

Class C Motorhomes

The record in *Figure 12* of Class C motorhomes was one of stability in 1987 and 1988, followed by a period of decline in 1989 that resulted in a drop of 53% in the 12 months from December 1988 to December 1989. After six months of stability at a higher level in 1990, higher oil prices and uncertainty brought about additional declines. By November 1990, Class C units were 27% behind the level of a year earlier.

Motorized units are advancing in consumer preference at the expense of towables.

Market Shares

At the start of the 1980s, towables held the high ground among RVs, with more than 45% of the market. Van conversions were in second place at 39%, and motorhomes were a distant third with a 16% share.

During the 1980s, towables lost their lead position as shipments of these units were surpassed by van conversions in 1982. Towables lost nearly 10 market-share points, while van conversions gained more than 10 points. *(See Figure 13.)* Since then, van conversions continued to make advances to the point of controlling nearly half of the market for RVs by 1990.

Because so many in the RV industry cling to the view that van conversions are *not* part of the industry, except for statistical purposes, it should be noted that towables have declined from 74.4% of the combined market of towables and motorhomes (the RV market as perceived by traditionalists) in 1980 to 70.7% in 1990. The implications, however, remain the same: Motorized units are advancing in consumer preference at the expense of towables.

A Summary Caveat

The persistence of every trend discussed here is open to question. Changing prices, the course of events and the tastes of consumers vary widely over time. The performance of different models in the future will depend on each of these factors and on the efforts that manufacturers and dealers make to advance their product lines. The downward drift seen in so many of these graphs also reflects the fact that American economic growth was stagnant for several years. Robust growth in the American economy would be the best prescription for changing the direction of the industry. Δ

Market Share History
(percent of total shipments)

	Towables	Motorhomes	Van Conversions
1980	45.45	15.64	38.91
1981	43.45	14.81	41.74
1982	40.86	16.03	43.11
1983	37.51	19.41	43.07
1984	35.38	20.59	44.02
1985	34.99	19.13	45.88
1986	34.23	17.84	47.93
1987	36.11	18.44	45.45
1988	35.15	17.06	47.79
1989	33.75	15.44	50.81
1990	35.72	14.79	49.49

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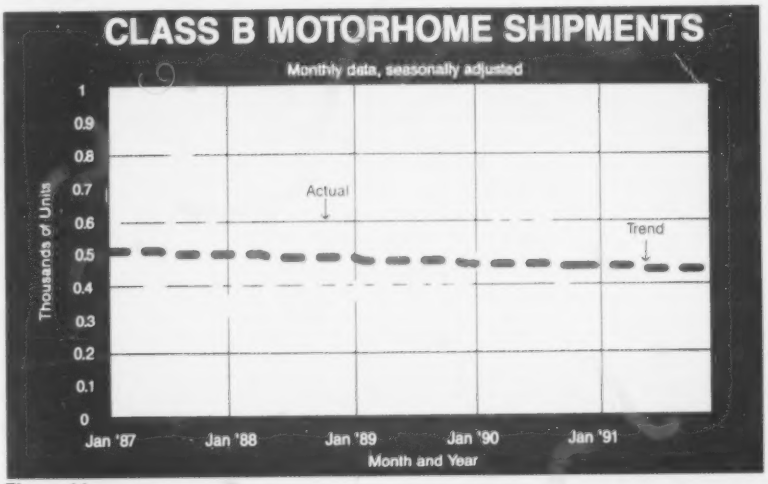

Figure 11

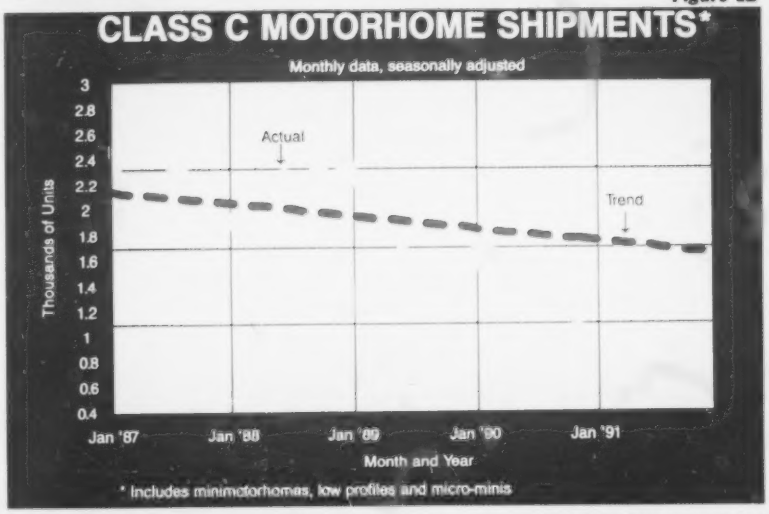

Figure 12

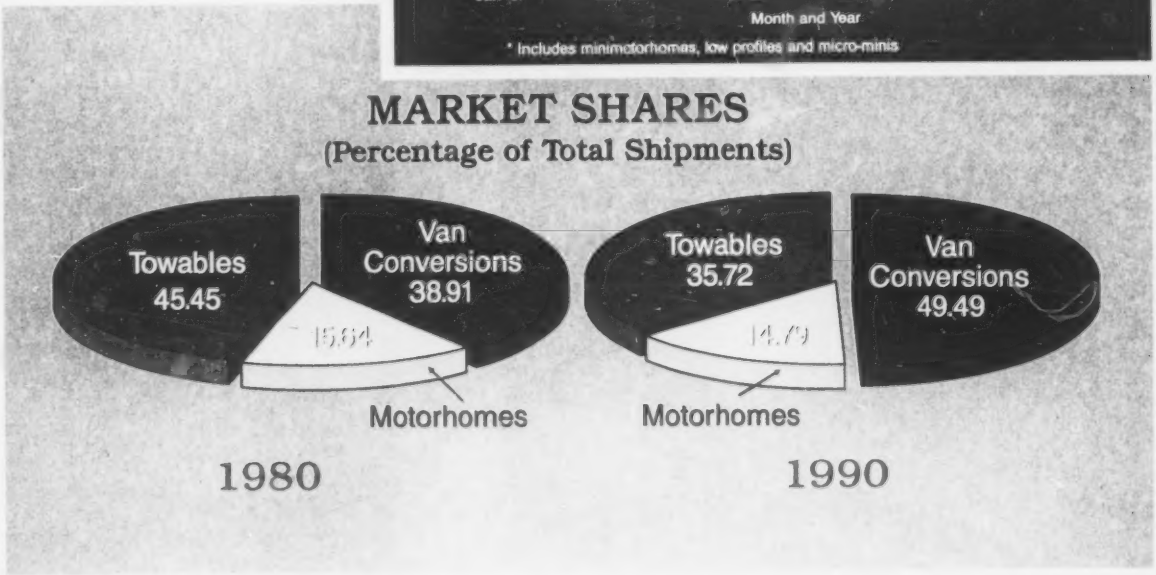

Figure 13

WHY SEASONALLY ADJUST DATA?

MORTON J. MARCUS

EFFECT OF SEASONAL ADJUSTMENT ON MONTHLY RV SHIPMENTS

Months/ Years	Shipments: Raw Data	Shipments: Seasonal Adj. Data	Month-to-Month Change: Number: Raw Data	Month-to-Month Change: Number: Seasonal Adj. Data	Month-to-Month Change: Percent: Raw Data	Month-to-Month Change: Percent: Seasonal Adj. Data
Jan '89	32,400	33,900				
Feb	35,000	34,820	2,600	920	8.0	2.7
Mar	38,800	33,350	3,800	-1,470	10.9	- 4.2
Apr	39,400	31,990	600	-1,360	1.5	- 4.1
May	36,400	31,500	-3,000	- 490	- 7.6	- 1.5
Jun	35,400	32,740	-1,000	1,240	- 2.7	3.9
Jul	31,900	32,940	-3,500	200	- 9.9	0.6
Aug	31,600	32,940	- 300	0	- 0.9	0
Sep	28,700	32,120	-2,900	- 820	- 9.2	- 2.5
Oct	31,500	32,800	2,800	680	9.8	2.1
Nov	27,300	34,270	-4,200	1,470	-13.3	4.5
Dec	27,300	32,620	0	-1,650	0	- 4.8
Jan '90	30,900	32,200	3,600	- 420	13.2	- 1.3
Feb	30,100	30,140	- 800	-2,060	- 2.6	- 6.4
Mar	35,600	30,580	5,500	440	18.3	1.5
Apr	39,300	31,980	3,700	1,400	10.4	4.6
May	38,200	33,080	-1,100	1,100	- 2.8	3.4
Jun	34,300	31,820	-3,900	-1,260	-10.2	- 3.8
Jul	31,700	32,740	-2,600	920	- 7.6	2.9
Aug	30,500	31,760	-1,200	- 980	- 3.8	- 3.0
Sep	23,900	26,790	-6,600	-4,970	-21.6	-15.6
Oct	25,600	26,820	1,700	30	7.1	0.1
Nov	18,200	22,960	-7,400	-3,860	-28.9	-14.4

Table 1

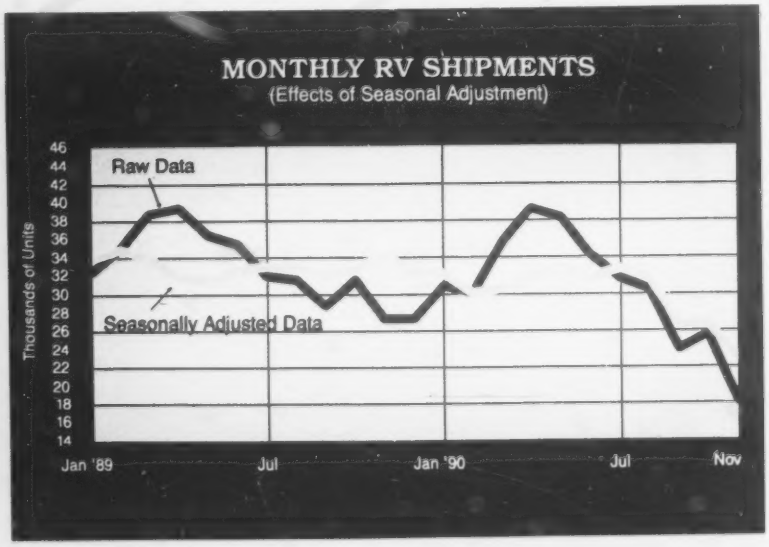

Figure 1

Wholesale shipments of RVs, like many other economic activities, show a strong seasonal pattern. Shipments are typically heavy in the spring months to meet consumer demand. Then, shipments fall off as the weather turns cooler and demand slackens. To reflect this normal seasonality and in order to compare data from month to month, data are adjusted from their raw form.

Without seasonal adjustment, misleading conclusions could be drawn from shipment or other economic data. If the seasonality of turkey sales were ignored or unknown, a person might think the industry had gone into a depression in January after the boom of November and December. By raising the January figure and lowering the peak months, that is by a statistical method of smoothing out the ordinary highs and lows, a proper comparison can be made between months.

Without seasonal adjustment, misleading conclusions could be drawn from shipments.

Why Adjust RV Data?

Table 1 and *Figure 1* show RV shipment data as reported for 1989 and 1990. These raw data indicate that shipments peaked in April 1989 at 39,400 units. But April is normally a strong month, often the very best month of the year as part of the annual increase in spring shipments. If just the raw data were considered, February 1989 would have shown a 2,600-unit increase, followed by 3,800 more units in March and then an-

Figure 2

Instead of showing a huge swell of shipments in the spring of 1990, Figure 3 shows the seasonally adjusted data with a flat trend in those months. Instead of shipments dropping off in the second half of 1990, they had a slight downward trend.

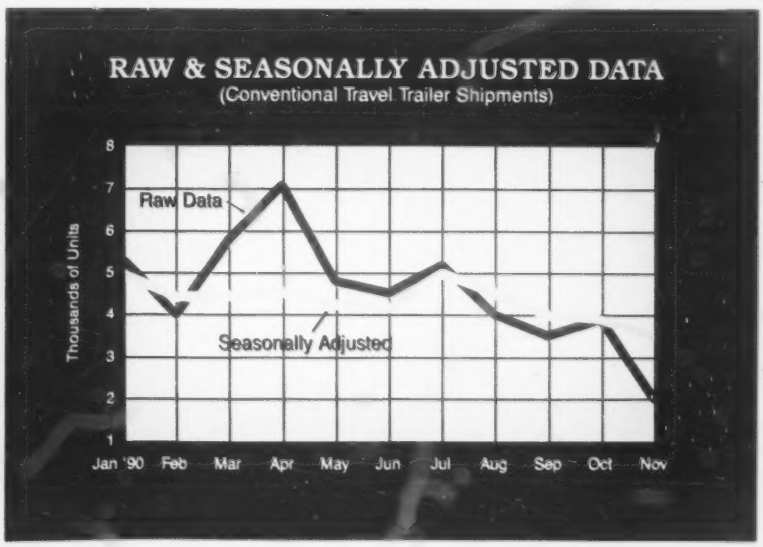

Figure 3

other 600-unit increase in April *(see column 4 of Table 1)*. The month-to-month percentage increases were impressive *(column 6 of Table 1)*.

But when the normal seasonal patterns are taken into account, a different picture emerges. April's 39,400 units were still shipped, but they are equivalent to 31,990 units when adjusted for seasonal patterns *(column 3 of Table 1)*. The month-to-month changes in volume and percent *(columns 5 and 7 of Table 1)* are much less dramatic now. In fact, March was a down month because the growth in shipments over February was weaker than is normal for that time of the year.

Using seasonally adjusted data, the analyst is alerted to a decline in shipment data in the spring of 1989 rather than being misled into believing in a growth that had not been taking place. At the same time, the last half of 1989 is seen to be flat in the seasonally adjusted data – without any suggestion of a decline from the first half of the year.

How Is It Done?

Seasonal adjustment of raw, reported data is accomplished by studying a data series over a long period of time. In many instances, RV data extend back to 1972 as a reasonably consistent series. From this history, seasonal patterns can be derived. If the truly average month is considered to have a value of 100, then a month which normally is 50% stronger in shipments would get a value of 150. A weaker month gets a value below 100.

Figure 2 depicts these "seasonal adjustment factors" as they have been developed for conventional travel trailers in 1990. April is nearly 60% above the average month. November and December are the slowest months – at between 50% and 60% of average monthly shipments. Only October comes close to being a truly average month. These data are also shown in *column 2 of Table 2*. (All the seasonal factors for a year added together equal 1,200 – 100 times 12 – so that the annual totals of the raw and seasonally adjusted data come out the same. But in Table 2, we have only 11 months of data as this piece goes to press so the totals are not equal.)

These seasonal factors (divided by 100) are applied by dividing them into the raw shipment data to get the seasonally adjusted shipments. *(In Table 2, column 1 divided by column 2 – divided by 100 – equals column 3)*.

The result of this calculation is a clearer picture of shipments in 1990. Instead of

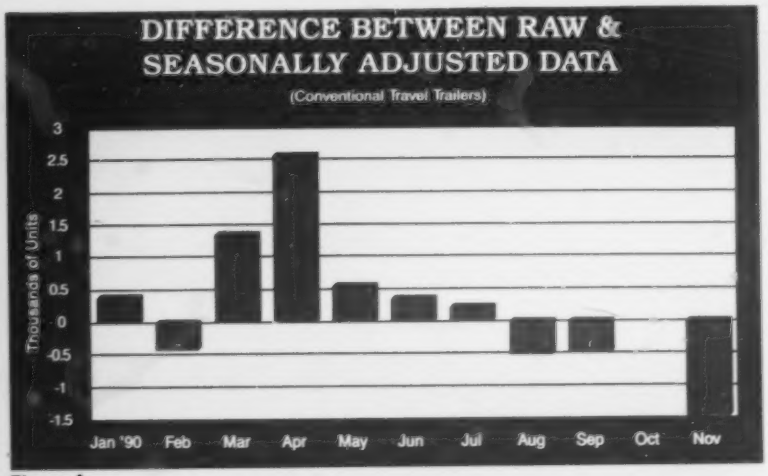

Figure 4

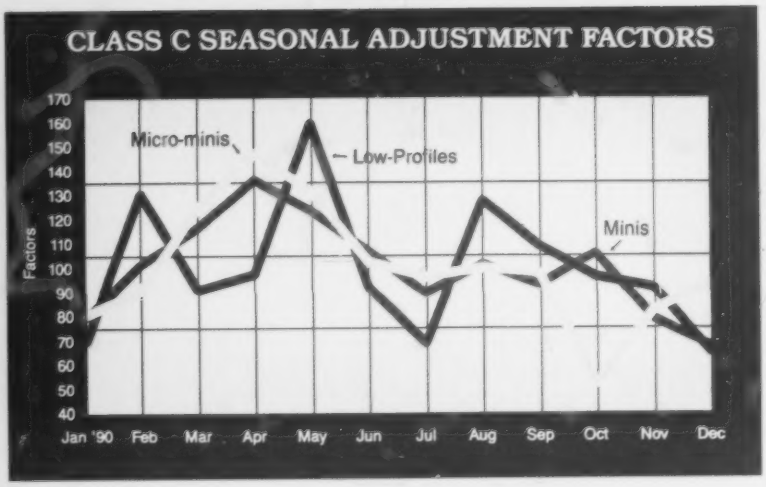

Figure 5

SEASONAL PATTERNS FOR CONVENTIONAL TRAVEL TRAILERS

Months 1990	Raw Data	Seasonal Factors	Seasonal Adj. Data	Difference Number	Difference Percent	Absolute Value Number	Absolute Value Percent
Jan	5,300	107.5	4,930	370	7.0	370	7.0
Feb	4,000	90.6	4,420	– 420	– 10.5	420	10.5
Mar	5,800	129.8	4,470	1,330	22.9	1,330	22.9
Apr	7,100	155.9	4,550	2,550	35.9	2,550	35.9
May	4,800	112.3	4,270	530	11.0	530	11.0
Jun	4,500	107.8	4,170	330	7.3	330	7.3
Jul	5,200	104.3	4,990	210	4.0	210	4.0
Aug	4,000	88.5	4,520	– 520	– 13.0	520	13.0
Sep	3,500	87.5	4,000	– 500	– 14.3	500	14.3
Oct	3,900	99.9	3,900	0	0	0	0
Nov	2,000	57.3	3,490	– 1,490	– 74.5	1,490	74.5
Dec	-	58.7	-	-	-	-	-
TOTAL	50,100	1,200.0	47,710	-	-	-	-
AVERAGE	4,555	100.0	4,337	217	4.8	750	16.5

Figures may not add to total because of rounding.

Table 2

seeing a huge swell in shipments in the spring, *Figure 3* shows the seasonally adjusted data with a flat trend during those months. Instead of seeing shipments dropping off during the second half of the year, they had a slight downward trend as 1990 came to a close.

The differences between the raw data and the seasonally adjusted data can be very significant. *Figure 4* shows the difference between the raw data points in *Figure 3* and the seasonally adjusted data points. The overstatement by the raw data for April was nearly 2,600 units or 36% *(see columns 5 and 6, Table 2)*. For November, the raw data understated shipments by nearly 1,500 units (a 74% difference).

The average difference between the raw data and the seasonally adjusted data is determined by disregarding whether it is a positive or negative difference. (The average difference shown in columns 5 and 6 tends to wash out and minimize the distortion.) The absolute values are shown in *columns 7 and 8 of Table 2*. On average, the first 11 months of 1990 yielded a difference of 750 units or 16.5%.

Low-profile units show a history of wide swings.

Different Patterns for Each Type

Seasonal patterns vary by product. For example, there are three types of Class C motorhomes. The low-profile Class C units have a pattern that is different from the minimotorhomes and the micro-minimotorhomes. Low-profile units show a history of wide swings with three high peaks. Minis and micros track fairly closely together and have a single April peak. But whereas micros have very weak Octobers, minis usually have an October that is fairly typical.

Each type of product needs to have its own seasonal pattern examined. In addition, the seasonal factors that apply for the industry and each type may not apply for each firm because of different geographic market orientations or differences in production and inventory management.

Seasonal adjustment of the data keeps attention on trends. Raw data are equally valuable since they represent actual resource utilization. Both are necessary statistics. Δ